TERMS OF REFERENCE

FOR THE PROVISION OF TECHNICAL ADVISORY SERVICES TO THE GOVERNMENT TECHNICAL ADVISORY CENTRE (GTAC) FOR THE INTERGOVERNMENTAL RELATIONS (IGR) DIVISION TO SUPPORT IN THE IMPLEMENTATION OF THE MUNICIPAL FINANCE IMPROVEMENT PROGRAMME (MFIP) PHASE IIIx

1x ASSET MANAGEMENT ADVISOR – RESEARCH

PN 1027

BACKGROUND INFORMATION

Programme Identification

Tender reference:	
Contracting authority	Government Technical Advisory Centre (GTAC), National Treasury
Name of project work stream	MFIP IIIx: Asset Management
Budget Manager	Johnson Matshivha Chief Director: MFIP
Purpose	Provision of asset management research and support within the National Treasury and Provincial Treasuries and Municipalities in line with province-specific strategies for municipal financial management support
Planned start date	On or about 01 July 2025

Johnson Matshivha
Chief Director: MFIP
Date: 15 April 2025

Contents

1 PURPOSE OF THESE TERMS OF REFERENCE

1.1. GTAC is seeking highly qualified, skilled, and experienced Technical Advisors (TAs) to provide professional services to support the National Treasury in the implementation of the Municipal Finance Improvement Programme (MFIP) Phase IIIx.

1.2. These terms of reference detail the general and specific qualifications, skills and experience requirements, the work that will be expected to be performed as well as other relevant contractual and working arrangements that will apply.

1.3. Offers will be accepted from individuals and/or companies that propose to provide resources for this work. The basis for the evaluation will be the qualifications, skills, and experience of individuals.

- Section 2 sets out background information on GTAC, the NT, MFIP IIIx and the TA sourcing process.
- Section 3 sets out the specific requirements for TAs in terms of the stipulated focus areas and activities.
- Section 4 sets out minimum submission requirements that will need to be met by bidders.
- Section 5 outlines the criteria that will be used to evaluate the functionality of bids.
- Section 6 sets out the general requirements expected from TAs.
- Section 7 outlines important contractual conditions that will apply to successful bidders.

2 BACKGROUND INFORMATION

2.1 General

2.1.1 GTAC is an agency of National Treasury, established to provide advisory services, programme management and transaction support across all spheres of government. Its central mandate is to assist organs of state in building capacity for efficient, effective, and transparent public finance management and in implementing high-impact government initiatives.

2.1.2 GTAC contributes to public finance management capacity development and knowledge sharing by:

(a) Promoting collaborative and innovative approaches to service delivery challenges, in collaboration with partner institutions;

(b) Developing and adapting methodologies and tools designed to meet government and public-sector management requirements;

(c) Communicating and publishing evaluation reports, case studies and research papers; and

(d) Public finance professional development.

2.1.3 GTAC implements its mandate through a client-focused and project-based approach and collaborates with partners inside and outside government in the development and delivery of its services.

2.1.4 GTAC has been appointed by the Intergovernmental Relations (IGR) division to appoint resources for phase IIIx of the Municipal Finance Improvement Programme (MFIP).

2.2 National Treasury

2.2.1 The National Treasury is committed to building capacity for sound and transparent financial management, across all three spheres of government.

2.2.2 The National Treasury has pursued an aggressive financial management reform and modernisation agenda in local government. To date, significant progress has been made of which milestones include, among others:

- Promulgation of the Municipal Finance Management Act (MFMA), 2003;
- Development and implementation of a fiscal framework aimed at supporting the Constitutional objectives of local government;
- Development and implementation of a budgeting framework for local government through the Municipal Budget and Reporting Regulations, 2009;
- Development and implementation of an in-year reporting framework, including the monitoring of conditional grant performance;
- Continuous refinement of the accounting standards (GRAP Standards) directly aligned to the principles of accrual accounting; and
- Promulgation of the Municipal Regulations on a Standard Chart of Accounts (mSCOA) on 22 April 2014, where after municipalities had a three-year preparation period to comply with the Regulation by 1 July 2017.

2.2.3 The Office of the Accountant General (OAG) promotes and enforces transparency and effective management in respect of revenue expenditure, assets, and liabilities of institutions in all three spheres of government. This includes the administration of the National Revenue Fund (NRF), the Reconstruction and Development Programme Fund (RDPF), and Banking Services (BS) for national departments. The OAG is the custodian of the PFMA and MFMA and is responsible for developing policies and frameworks on accounting, internal audit and risk management.

2.3 Background to MFIP

2.3.1 As a result of the persistent poor performance of municipalities over the past fifteen years, numerous support programmes and interventions have been initiated by both national and provincial governments in an effort to improve the capacity of local government, address inadequate service delivery issues, and enhance good governance through improved accountability and transparency.

2.3.2 The Municipal Finance Improvement Programme is incorporated into the National Treasury (NT) Strategic Plan, and currently institutionalised within the NT, in the Intergovernmental Relations (IGR) division. The overall strategic goal of the programme is to facilitate improvements in the management of the financial affairs of municipalities, and to facilitate effective implementation of the Municipal Finance Management Act (MFMA), Act 56 of 2003.

2.3.3 The MFIP supports Pillar 3, Priority 6 of Government's Medium-Term Strategic Framework in building a capable, ethical and developmental State as it relates to outcome 2, i.e., functional, efficient and integrated government.

2.3.4 The current MFIP is a strategically driven programme of technical assistance aligned to the six LGFM game changers, designed to build the institutional and technical financial management capacity of NT, PTs and Municipalities. This is mainly achieved through the placement of Technical Advisors (TAs) within the MFMA support units of provincial treasuries, and the Budget and Treasury Office (BTO) of municipalities.

2.3.5 The MFIP IIIx operating model is set out in the figure below and illustrates the alignment of the integrated project work streams to the six LGFM game changers. It further shows the three modalities of providing direct institutional and technical capacity support to selected NT divisions, PT municipal finance units and the BTOs of identified municipalities.

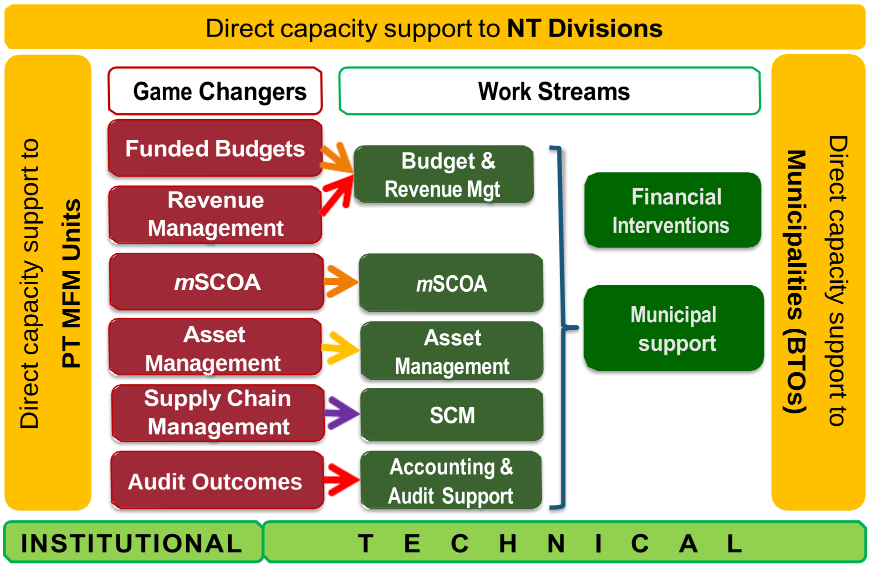

Figure 1: MFIP Operating Model

2.3.6 The MFIP Programme Management Unit (PMU) is responsible for providing the overall strategic leadership, oversight, management, and support required for the successful implementation of the Municipal Finance Improvement Programme.

2.3.7 The PMU is led by a Chief Director who is supported by Directors and other Project Support officials. The PMU oversees the work performed by MFIP TAs deployed to the NT, respective PTs and participating municipalities.

2.3.8 The MFIP also works in close consultation with relevant NT Chief Directorates to ensure coherence of policy implementation and specialist support and the co-development of initiatives, tools and systems that can be used to strengthen overall improvements in the local government financial management space.

2.3.9 This ToR is primarily for one (1) Asset Management Advisor who will be placed via the MFIP at the National Treasury.

Kindly note that GTAC reserves the right to amend the list of provisionally nominated provincial treasuries indicated above based on strategic considerations and operational requirements. GTAC reserves the right not to appoint all TAs as per the TOR.

3 SPECIFIC TA REQUIREMENTS

3.1 Overall Objective

To work with NT, provincial treasuries and their related municipalities to improve Asset Management practices and performance.

3.2 Specific Scope of Work

The key activities per focus area over the duration of the project will include, but not limited to the areas highlighted below.

Table 1: National Treasury: Asset Management (Research) Focus Areas and Key Activities

Focus Area	Activities
Institutional support	• Minimum requirements for asset managers in local government – competencies and affiliations. • Ongoing update and development of general guidance on the implementation and application of the non-financial asset related Standards of GRAP – review existing guidance, against latest standards and audit concerns. • Ongoing research on accounting matters that require transaction specific guidance, with development and consultation on solutions to address the identified issues. • Development of publication series and/or short content on accounting implementation topics using existing, new and/or updated OAG material. • Development of generic slide deck (i.e., presentations) on the Standards of GRAP with facilitators manual / notes. • Review of the annual report requirements and practices and development of recommendations with reference to local and international developments.
Asset accounting	• Update the existing asset management framework for local government (encompassing movable and immovable assets including infrastructure assets) • Develop integration framework of asset management framework and other initiatives relating to asset e.g. infrastructure funding, CIDB guidance etc • Development of practical guide / facilitation materials on the updated asset management framework • Develop minimum requirements for municipal asset register that will ensure full integration with the general ledger and compliance with mSCOA requirements. • Ongoing research of asset management and accounting issues that needs guidance from NT to resolve, development and consultation on solutions to address the identified issues. • Creating repository of asset management findings and best practices to address such. • Establish asset management forum for discussion of issues and sharing of best practices.

	• Establish asset management performance reporting requirements within municipalities
Asset Management SOPs	• Review and update generic Standard Operating Procedures (SOPS) on asset management, ensuring alignment with any SOPS on SCM • Develop implementation material, such as templates, etc to support municipalities using the generic SOPs

3.3 Project location and reporting

The Asset Management TA, for the duration of the project will be based at the NTs OAG, as per the list indicated above and on the attached CV template. They will report to the designated NT counterpart and the MFIP PMU (Asset Support) and will be required, from time to time, to attend national, provincial and local level meetings over the duration of the programme.

3.4 Specific expertise required

The successful bidders for the Asset Management Advisor role, over and above the general capabilities, should demonstrate their experience and achievements in implementing asset management operations, reforms, and performance improvement initiatives. Emphasis must be placed on the focus areas outlined in specific scope of work outlined in this ToR.

4 SUBMISSION REQUIREMENTS

4.1 Minimum requirements from the bidder(s)

Bidders must ensure that the following submission requirements are included in their bids:

4.1.1 Administrative Compliance

Bidders are required to submit all returnable documents as outlined below.

No.	Document to be submitted	Requirement
1.	Electronic submission: The bid proposal is to be submitted to the relevant platform before closing date and time of the bid. The folders/ Files must be clearly marked and separated.	Electronic submission: Confirmation report to indicate all bid documents received on or before the closing date and time of the bid.
2.	SBD 1- SBD Invitation to Bid	Complete and sign the supplied pro forma document.
3.	Central Supplier Database (CSD) Registration Report or CSD Registration number or SARS Pin	Bidders **must** be registered on the Central Database System (CSD) at the closing date and time of the bid.
4.	SBD 3.3 – Pricing Schedule	Completed and sign the supplied pro forma document.

No.	Document to be submitted	Requirement
5.	Declaration of Interest – SBD 4 (Refer to below disclosure)	Complete and sign the supplied pro forma document. Failure to submit or fully complete SBD 6.1 from will result in the bidder forfeiting points for specific goals.
	Note: *Bidder's must submit the attached SBD 4 document. A bid may be disqualified if this disclosure is found not to be true and complete in every respect. The following definitions should be considered when completing the form:* *- ''Person'' means a bidder or supplier or shareholder, director, trustee, partner, member of a bidder or supplier having the controlling interest in the bidder or supplier.* *- ''State'' means a national or provincial department, national or provincial public entity or constitutional institution, a municipality or municipal entity, a provincial legislature or parliament.*	
6.	SBD 6.1 - Preference Point Claim Form in terms of the Preferential Procurement Regulation (PPR) 2022	Complete and sign the supplied pro forma document. Failure to submit or fully complete SBD 6.1 from will result in the bidder forfeiting points for specific goals.
7.	Prescribed CV template as provided in the submission platform	Completed and signed the supplied pro forma template.

CV TEMPLATE

Bidders are encouraged to submit the required information as prescribed in the CV Template provided (Annexure A). GTAC reserves the right to confirm with individuals where their names appear in more than one bid.

TAX CLEARANCE STATUS

A valid tax pin / Central Supplier Database (CSD) number must be provided for purposes of verifying that the tax matters of the bidder are in order. Where a consortium/joint ventures/sub-contractor is involved each party to the association must submit a separate validation of Tax status and CSD registration number.

During this phase, bid documents will be reviewed for completeness and to ensure compliance with tax matters and registration on Central Supplier Database (CSD) at closing date and time.

Bidder's tax matters must be compliant at the time of award. In case where a bidder's tax matters are non-compliant a bidder will be given a maximum of seven (7) working days to remedy the tax matters. Failure to remedy this will invalidate the bid.

4.1.2 Mandatory Requirements

Bidders must submit a responsive proposal in accordance with these terms of reference.

Failure to adhere to any of these requirements will result in disqualification.

a) CVs from persons in the employ of the state[1] and persons currently contracted on MFIP will not be considered.

b) Any bidder representative (Director/Shareholder/Proposed Resource) who is employed by the State will not be considered i.e. if a bidder representative is in the employ of the state, such a bid proposal will not be considered.

c) Companies are only allowed to submit no more than three (3) resources per position. Should more than 3 resources be proposed per position, only the first three (3) resources will be evaluated.

d) Bidders must be registered on Central Supplier Database (CSD) on closing date of the tender.

e) Submission of a price proposal SBD 3.3 is required.

f) Bidders must ensure that CVs are signed by the respective individuals confirming that he/she is not included in bids from other service providers.

g) CVs of any one individual may only be submitted as part of one bid, GTAC reserve the right to confirm with the individual.

Failure by a bidder to comply with the above minimum requirements will result in such Bidder's proposal not being evaluated further.

4.2 Technical Requirements

4.2.1 Bidders must provide supporting documentation as proof of educational qualifications as well as all required certificates contemplated below.

Please note that a bidder will be requested to provide certified copies of certificates prior to the award being made.

4.2.2 All international qualifications must be accompanied by South African Qualifications Authority (SAQA) Accreditation. Please note Certificate of membership shall not be deemed as proof of educational qualification (Education qualifications refers to certifications issued by institution of high learning e.g., Certificate, diploma, degree, etc.)

4.2.3 The bidder must indicate the educational qualifications in respect of each resource offered in line with the QUALIFICATIONS EVALUATION CRITERIA listed in **Table 2** below.

[1] ''State'' means a national or provincial department, national or provincial public entity or constitutional institution, a municipality or municipal entity, a provincial legislature or parliament.

4.2.4 The bidder must show the “Number of years’ experience in local government financial management” and “managerial positions” in respect of each resource offered as per the GENERAL EXPERTISE EVALUATION CRITERIA in **Table 2** below.

4.2.5 Each bidder will be required to provide a record of “demonstrated experience and achievements” and “years’ experience” for each resource offered as per the SPECIFIC EXPERTISE EVALUATION CRITERIA listed under sections 3.1 and 3.2 in **Table 2** below.

4.2.6 The above criteria are catered for in the CV template that each bidder is encouraged to use. Bidders who do not provide a record of experience will not be considered for the role. The evaluation will place an emphasis on the hands-on experience, achievements, the scale and scope of the projects and reforms implemented, the extent to which the experience demonstrates a holistic view of the specialisation and context and demonstrates the candidate's ability to conceptualise and lead change initiatives.

4.2.7 Candidates must elaborate in their CVs specific hands-on experience including the reforms that he/she was actively involved in. The record of experience will be used to evaluate the bidder’s specific experience using the evaluation criteria below.

5 EVALUATION CRITERIA

The evaluation committee members will individually evaluate the responses received against the following criteria as set out below. The functionality evaluation of individual CV`s will be carried out as per evaluation criteria stipulated in **Table 2** below.

The functionality evaluation will be conducted in two (2) stages:

- Functionality Evaluation: Technical Desktop Evaluation; and
- Functionality Evaluation: Interviews.

5.1 Functionality Evaluation (Stage 1: Technical desktop evaluation)

5.1.1 Technical evaluation criteria for the TAs are stipulated in **Table 2** below.

5.1.2 Only bidders who score a minimum of 65 points during the technical evaluation stage will be invited to interviews prior to consideration for Pricing.

Table 2: National Treasury: Asset Management (Research) Functionality Evaluation Criteria (Stage 1: Technical desktop evaluation)

No.	EVALUATION CRITERIA	SCORING	WEIGHT
1.	**QUALIFICATIONS**		***20***

No.	EVALUATION CRITERIA	SCORING	WEIGHT
	1.1 Highest educational qualification obtained in: • Financial management (Auditing / Economics) • Accounting • Public administration/management, • Business administration/ management	5 = Honours degree/Postgraduate diploma or higher (NQF8); 4 = Bachelors degree/B-Tech/Advanced Diploma (NQF7) 3 = National diploma (NQF6) 2 = National higher certificate (NQF5) 1 = National Senior (Matric) certificate (NQF4) 0 = No submission of SAQA accreditation (where applicable), or non-relevant qualification submitted	20
2.	**GENERAL EXPERTISE**		***20***
	2.1 Number of years' experience in Public Sector financial management or a component thereof	5 = more than 10 years 4 = more than 7 and up to 10 years 3 = more than 4 and up to 7 years 2 = more than 2 and up to 4 years 1 = up to 2 years 0 = No relevant/experience demonstrated	20
3.	**SPECIFIC EXPERTISE**		***60***
	3.1 Demonstrated knowledge of the MFMA, and experience in municipal finance operations, implementing financial management reforms and performance improvement initiatives. With respect to experience in financial management operations and reforms, relevant components linked to the specific scope of work include, but not limited to: ▪ Conducting research on accounting matters ▪ Developing publications and content on accounting implementation topics ▪ Developing terms of references to establish oversight committees or governance structures (i.e. asset management forums /steering committees, etc.) ▪ Developing practical guides, and/or facilitation materials on the updated asset management frameworks and GRAP standards. ▪ Conducting research on asset management and accounting issues that need guidance from NT to resolve.	5 = Excellent (demonstrated expertise in all five components) 4 = Good (demonstrated at least four components) 3 = Average (demonstrated at least three components) 2 = Below Average (demonstrated at least two components) 1 = Poor (demonstrated at least one component) 0 = No experience and knowledge demonstrated)	35
	3.2 Cumulative years' experience in municipal finance operations, implementing reforms, and performance improvement initiatives as per the components listed under 3.1 above.	5 = more than 8 years 4 = more than 6 and up to 8 years 3 = more than 4 and up to 6 years 2 = more than 2 and up to 4 years 1 = up to 2 years 0 = No experience demonstrated	25

No.	EVALUATION CRITERIA	SCORING	WEIGHT
TOTAL			**100**
Bidders who are successful in meeting the functionality threshold of 65 points will be invited to attend an interview.			65 points

5.2 Functionality Evaluation (Stage 2: Interviews)

5.2.1 Interviews will be used to verify the bidder's specific knowledge, experience and abilities in area/s of work that they are offering their services.

5.2.2 Interview evaluation criteria for the TAs are stipulated in the **Table 3** below.

5.2.3 Only bidder's that meet the 65 points threshold for both the technical evaluation and interviews will be considered for Price and Specific Goals evaluation in terms on Preferential Procurement Regulation (PPR) 2022. However, the final score for functionality will be the simple average of the sum of the technical evaluation and interview scores.

Table 3: National Treasury: Asset Management (Research) Functionality Evaluation Criteria - Stage 2: Interviews

Component	Criteria	Weight per component
Demonstrated knowledge of relevant legislation, regulations, and other prescripts	5 = Excellent 4 = Good 3 = Average 2 = Below Average 1 = Poor	20
Demonstrated ability to identify and prioritise key issues and improvement areas within the function	5 = Excellent 4 = Good 3 = Average 2 = Below Average 1 = Poor	30
Demonstrated ability and experience in conceptualisation, developing, and implementing solutions to the identified issues	5 = Excellent 4 = Good 3 = Average 2 = Below Average 1 = Poor	30
Demonstrated advisory, and skills transfer	5 = Excellent 4 = Good 3 = Average 2 = Below Average 1 = Poor	20
Total		**100**
Only bidders who meet the 65 points threshold for the functionality evaluation in the interviews (stage 2) will be considered for PPR of 2022.		**65 points**

Only bidder's that meet the 65 points threshold for both the technical evaluation and interviews will be considered for Price and Specific Goals evaluation in terms of Preferential Procurement Regulation (PPR) 2022.

5.3 PREFERENTIAL PROCUREMENT EVALUATION BASED ON 80/20 PRINCIPLE

5.3.1 The applicable formula (80/20) will be utilised to evaluate the bid, of which eighty (80) points are allocated for price as allocated in the enclosed form SBD 6.1. that must be completed, and the remaining twenty (20) points are allocated for the specific goals as indicated in the table below.

Table 4: Specific Goals

Number of points allocated (80/20 system)	
Price	**80**
The specific goals in terms of this tender	**20**
Above 30% ownership for Historically Disadvantaged Individuals who had no franchise in national elections before the 1983 or 1993 Constitutions.	10
Women percentage of ownership: 30% and above	10
Total Points	**100**

6 GENERAL REQUIREMENTS

6.1 Period and level of effort

MFIP IIIx TAs will be procured as follows:

6.1.1 For a period ending on 31 March 2026.

6.1.2 Will be required to work normal working hours on a full-time basis for the duration of the programme, unless otherwise agreed by the parties.

6.1.3 The maximum level of effort required per financial year (1 April to 31 March) will be 230 normal working days or 1 840 hours. This will be pro-rated for the first financial year based on the actual date of appointment.

6.1.4 The contract will be reviewed at least bi-annually based on performance.

6.2 Additional work to be performed

Across all areas of work, TAs will be expected to:

6.2.1 Build and maintain positive working relationships with all MFIP participants and stakeholders;

6.2.2 Serve as resources for technical specialist advisory on strategic priorities and projects;

6.2.3 Contribute to MFIP's annual, quarterly, and monthly reporting;

6.2.4 Promote learning and cooperation for improved service delivery and sustainability;

6.2.5 Support the development and refreshment of methodologies and toolkits relevant to MFIP; and

6.2.6 Support knowledge generation including the identification of areas for knowledge sharing the development of case studies, and participation in knowledge sharing initiatives.

6.3 General capabilities required

Across all areas of work, TAs must have the following general capabilities.

6.3.1 Collaborative team player with excellent interpersonal skills and the ability to effectively interact with stakeholders;

6.3.2 Logical, creative, innovative, analytical, lateral thinking, and problem solving;

6.3.3 Communication skills (verbal & written) with the ability to listen and learn;

6.3.4 Ability to transfer skills;

6.3.5 Ability to work under consistent and continuous pressure from varied sources, yet be able to maintain a supportive approach;

6.3.6 Computer skills including detailed knowledge and use of the Microsoft Office Suite;

6.3.7 Sound financial planning and analytical skills;

6.3.8 Ability in consulting and advisory services (internal or external);

6.3.9 Ability to review and analyse strategic issues, current roles, functions, interface, processes and procedures, risks, and options; and

6.3.10 A clear understanding of the desired outcomes of the local government financial management and budget reform agenda.

6.4 Limitations of Assistance

Resources provided by GTAC including the TAs appointed via this process:

6.4.1 Have no authority or signing powers to bind either the client or GTAC unless as provided for in the Project Charter or agreement between GTAC and the Client; and

6.4.2 May only provide support and execute functions as set out in the agreed Project Charter, these Terms of Reference; and as defined in the MFIP IIIx Programme Management Plan.

6.5 Monitoring and Reporting

6.5.1 Monthly activity reports on the progress with reference to the work plan and specified key performance indicators will be compiled and submitted to the MFIP PMU.

6.5.2 TAs may from time to time be required to perform other functions as determined by the Head of MFIP, however, within the scope of work performed generally by the unit.

6.5.3 In addition, TAs may from time to time be required to perform other functions as determined by the Head of MFIP, however, within the scope of work performed generally by the unit.

7 CONTRACTUAL CONDITIONS

7.1 Contracting Authority

The service provider will contract directly with the GTAC.

7.2 Contract Fees

7.2.1 Remuneration of TAs has been benchmarked against public service rates taking into account reasonable adjustments for overhead costs of long-term consultants. The rate for the TAs will thus be capped at R750.00 per hour **excluding** VAT or R862.50 per hour **inclusive** of VAT.

7.2.2 Successful bidders will be required to register for VAT as the annual contract amount is above the VAT threshold.

7.2.3 Fees may be adjusted in April of each year at the discretion of the Head of GTAC and the IGR taking into consideration available budget and government’s fiscal stance.

7.2.4 Fees exclude direct costs relating to project execution such as travel for which GTAC will make provision.

7.2.5 GTAC will make offers to successful bidders.

7.2.6 Bidders who meet the functionality and technical evaluation criteria and are considered as runner ups in terms of the final scoring, will be added to the list of eligible bidders for appointment should there be a need to appoint (even those whose tax status is not compliant at that time). GTAC reserves the right to confirm with individuals prior to adding their names to the list of eligible bidders and only those whose tax status is compliant shall be eligible for appointment.

7.2.7 Bidders who meet the functionality and technical evaluation criteria and are considered as runner ups in terms of the final scoring, will be added to the list of eligible bidders for appointment should there be a need to appoint (even those whose tax status is not compliant at that time). GTAC reserves the right to confirm with individuals prior to adding their names to the list of eligible bidders and only those whose tax status is compliant shall be eligible for appointment.

7.2.8 GTAC does not pay for TA travel and parking costs to and from place of residence and their place work.

7.2.9 GTAC will not pay relocation costs or additional allowance for accommodation for successful bidders placed outside of their usual place of residence (home town).

7.3 Facilities to be provided by TAs

TAs will be responsible for the provision of any computer equipment (see Annexure A: Minimum Specifications), connectivity, and all other administrative supplies that may be required over the duration of the programme.

7.4 TA Reporting Requirements

7.4.1 The following reports will be submitted by TAs as proof of delivery of services:

(a) Daily capture of effort/time and audit evidence indicating work done, deliverables submitted, and time allocated to the achievement thereof;

(b) Monthly progress reports;

(c) Performance reports, at least bi-annually in support of individual TA performance reviews; and

(d) A close-out report on completion or termination of the TA contract.

7.4.2 As part of project work, TAs will be required to deliver agreed project reports and project closure reports as determined by the Head of the MFIP PMU;

7.4.3 Reports shall be written in English; and

7.4.4 All reports, files, notes, electronic files, and documents shall be structured, formatted, and completed according to the requirements of the MFIP PMU.

8 BID VALIDITY PERIOD

The bid will be valid for a period of 90 (ninety) days from the closing date of the bid.

9 SUBMISSION DETAILS

Bidders to note that only electronic submission is allowed for this bid using the GTAC Vendor Portal, available on the link provided below:

https://vendorportal.gtac.gov.za/

Bidders are required to first register on the GTAC Vendor Portal and then login to the portal to access the tender.

The registration process involves the following steps:

a) Register as a portal user. This is the process of creating a user account on the vendor portal. This will allow the user to view and respond to tenders.

b) Register your supplier details. Registering your company details will allow you as the supplier to upload relevant information and documents. Supplier details must be captured in order to receive a vendor or supplier number, and will then be eligible to respond to tenders.

To respond to this tender, suppliers should login to the portal and navigate to the tender menu then select “Formal” then click on “Current”. This will provide a list of the available tenders. Bidders can select this tender (reference TEN0000000037) to start the submission process.

The capturing process is in the form of a wizard with the system guiding you through each step. Once all the required information is completed, remember to submit your bid. Only submitted bids will be eligible for award.

NB: Do not submit hardcopy bids to GTAC or the Tender Information Centre (TIC) Submissions received after the closing date and time will not be accepted.

10 CLARIFICATIONS

a) Requests for clarification must be made in writing by e-mail to **psp@gtac.gov.za.**
b) Requests for clarification will be accepted by GTAC as specified in the bid document. The submission reference must be included in the subject line of the email.
c) Telephonic enquiries for clarification will not be accepted. Bidders must reduce all enquiries to writing.

11 NON-COMPULSORY BRIEFING SESSION

A non-compulsory briefing session will be held at a specified date and time as indicated in the cover / invitation letter of this bid.

12 CONTACT DETAILS

Professional Services Procurement, 3rd Floor at GTAC
Private Bag x 115, Pretoria, 0001
Physical address: GTAC, 40 Madiba Street (Vermeulen), Pretoria
For any enquiries, email: psp@gtac.gov.za

13 TOOLS OF TRADE

Base Operating System Requirements

Current and Supported:

To protect our network and ensure seamless compatibility, contractor devices must run operating systems that are currently supported by the manufacturer. This means they are capable of receiving regular security updates and patches.

Specifically:

Windows Devices (only Pro* or Enterprise editions): Must run at least Windows 10 – version 22h2.

All versions of Window 11 are supported.

macOS Devices: Must run the latest or immediately previous version (i.e., macOS 15 Sequoia or **macOS** 14 Sonoma).

***Note:** Home versions of Windows are not suitable due to their limited security features and lack of enterprise management tools, which are essential for compliance with regulatory standards like POPIA, GDPR, HIPAA, and PCI DSS.

Basic Security Features:

- Home versions are equipped with basic security features suitable for personal use but often lack advanced security measures needed for protecting sensitive corporate data. For example, Windows 10 Home lacks BitLocker drive encryption, a critical feature for securing data on a device.
- **No Advanced Threat Protections:** They often do not include advanced threat protection services like Microsoft Defender for Endpoint, which are crucial for defending against sophisticated cyber threats.
- **Data Compliance Risks:** Home versions may not comply with various regulatory requirements that businesses must adhere to, such as POPIA, GDPR, HIPAA, or PCI DSS, because they cannot enforce policies that control data access and sharing.
- **Lack of Audit Trails:** There is often a lack of proper auditing capabilities, which are essential for compliance and for tracking access to sensitive data.
- **Regular Updates:** Contractors should configure their laptops to receive and install updates/patches automatically. This includes any and all third-party applications, where applicable.

Antivirus and Anti-Malware Software

Contractors are required to maintain active antivirus and anti-malware protection on their devices. The following specifications must be met:

Default Protection: Microsoft Defender Antivirus, which is installed by default on all Windows 10 and 11 devices, is strongly recommended due to its integration and optimization with the operating system.

Alternative Solutions: Contractors may opt to use another reputable antivirus package, provided it meets our security standards. Examples of acceptable alternatives include solutions from vendors like Norton, McAfee, or Sophos.

Requirements: All antivirus solutions must support real-time scanning and threat detection and must be configured to update automatically and perform regular scans to ensure the highest level of protection against malware and other security threats.